



Owens Corning Glass Summit – Washington November 2, 2009

John Hutchinson
Cullet Sourcing Leader





Owens Corning

- **65 year old ~\$6 Billion company based in Toledo, Ohio**
- **Heritage of Innovation**
- **Strongly identified with Building Materials**
- **Industrial Leader in all Markets**



Products & Systems – Services & Solutions

Building Materials

- **Insulating Systems**
Commercial & Industrial, Acoustic, OEM Solutions
- **Roofing & Asphalt**
Residential & Industrial
- **Masonry Products**
- **Construction Services**
Owens Corning Franchising

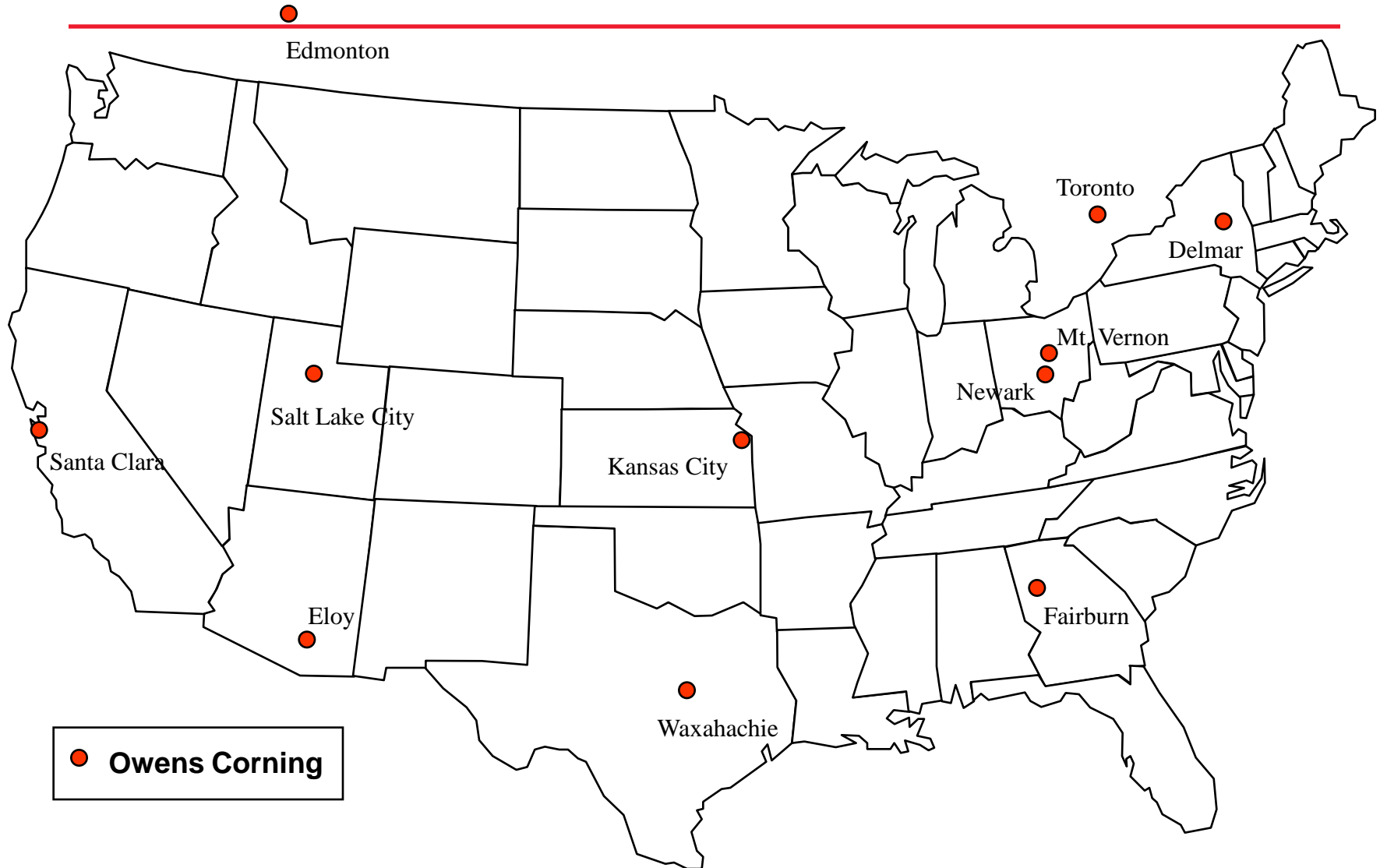
Composite Solutions

Automotive, Wind Energy,
Marine, Long-Fiber
Thermoplastics and Glass
Fiber Reinforcements





Owens Corning – Insulation Locations





Cullet Volume

- Owens Corning Consumes Over 1 Billion Pounds of Recycled Glass Annually
- Highest in Fiberglass Market
- Creates 75 Year Continuing Energy Savings Value



Owens Corning uses enough recycled glass in its **PINK Fiberglas™ Insulation...** to wrap a two lane glass highway around the earth **1.3** times.*



* PINK Fiberglas™ Insulation has the highest level of certified recycled content for fiberglass insulation in North America at 40%. Owens Corning is one of the largest recyclers of glass in the world and uses both pre- and post-consumer materials.

This graphic assumes a highway 20 feet wide by 4 inches deep.



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The color PINK is a registered trademark of Owens Corning. © 2008 Owens Corning.



Why is Cullet Important?

- **Cullet saves \$\$/ton...** in combined energy reduction, extended furnace life & materials.
- **Cullet increases furnace pulls.** In a network sold out position, the pull benefit of Cullet generates additional capacity.
- **Cullet is #1 item in ISB Sustainability goals,** reducing emissions & energy consumption.
- **Cullet allows for OC's industry leading Insulation Recycle content** (50% Certified by SCS). Also a qualifying component in builder programs requiring LEED standards.
- **#1 Batch material by volume,** representing over ½ of all batch materials



Recycled Content Certification - 2008

- Minimum 35% certified recycled content
- Highest in fiberglass insulation market





Recycled Content Certification - 2009

- Minimum 40% certified recycled content
- Highest in fiberglass insulation market





Recycled Content Certification - 2010

- Minimum 50% certified recycled content
- Highest in fiberglass insulation market
- Product break out – light density v. heavy density
- Greenbuild announcement – November 2009

SCIENTIFIC CERTIFICATION SYSTEMS

SCS does hereby certify that an independent assessment has been conducted on behalf of:

Owens Corning Sales, LLC

Newark, OH, USA; Mt Vernon, OH, USA; Kansas City, KS, USA; Iowa City, IA, USA; Woodstock, TN, USA; Paducah, GA, USA; Dekalb, NY, USA; Salt Lake City, UT, USA; Elgin, AZ, USA; Edinburg, AR, CAN; Toronto, ONT, CAN

For the following product(s):

Owens Corning Light Density Fiberglass Products, including Un-faced Batts & Rolls, Faced Batts & Rolls (Kraft, Foil, and other materials), Loosefill Insulation, Metal Building Insulation Products, and Air Handling Products (SoftR® All-Service Duct Wrap and Flexible Duct Media)

This product meets all of the necessary qualifications to be certified for the following claim:
Minimum 50% Recycled Glass Content, with at least 20% Post-consumer Recycled and the balance (30%) Pre-consumer Recycled Glass Content (plant-wide weighted average)

Registration # SCS-MC-03025

Valid from: 10/1/2009 to 9/30/2010



Robert J. Hughes
Robert J. Hughes, Senior Vice President
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2200 Powell Street, Suite 725, Emeryville, CA 94608 USA

Certified by
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Certification for a sustainable world



SCIENTIFIC CERTIFICATION SYSTEMS

SCS does hereby certify that an independent assessment has been conducted on behalf of:

Owens Corning Sales, LLC

Newark, OH, USA; Woodstock, TN, USA; Mexico City, Mexico

For the following product(s):

Owens Corning High Density Fiberglass Products, including FIBERGLAS™ 700 Series Insulation, QuietR® & QuietZone® Air Handling Products, Pipe Insulation Products, OEM Insulation Products, Acoustic Blankets and Boards, Shaftwall Insulation, Curtainwall Insulation, Fiberglas™ Products, and Owens Corning Mexico Fiberglass Products

This product meets all of the necessary qualifications to be certified for the following claim:
Minimum 55% Pre-consumer Recycled Glass Content (plant-wide weighted average)

Registration # SCS-MC-02066

Valid from: 10/1/2009 to 9/30/2010



Robert J. Hughes
Robert J. Hughes, Senior Vice President
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Cullet Marketplace

Cullet Marketplace (Tight)

– Significant Supply Constraints

- Plate Glass supply is scarce due to growing demand for Plate and reduced NA supply of Plate.
- Container glass supply requires recycling programs to be viable & capital investment by processors. Much supply goes to Landfill.

– Price

- Plate glass inflation is above other commodities.
- Container glass inflation is near other commodities.

– Supply Gap

- 2/3's of today's supply is plate glass, 1/3 Container.
- Based on production plans, sustainability goal and plate glass, hundreds of thousands of tons of new container supply needed.

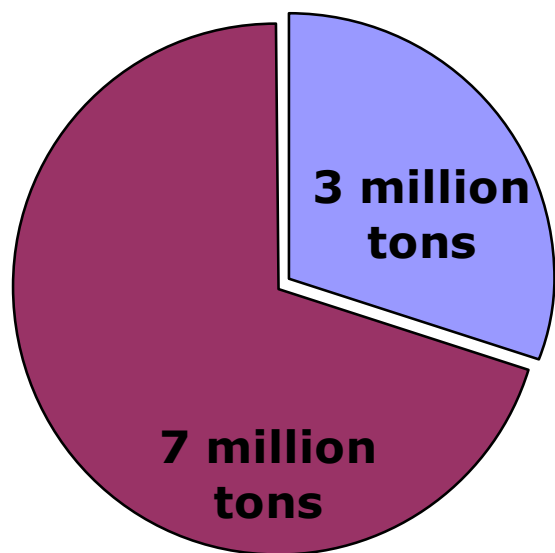


Bottle Strategy

A Strong majority of produced glass ends up in land fills **

- Approximately 39 Billion Glass containers are produced or imported every year in US. [approx 10 Million tons]/yr.*

US Container Glass going to Landfill



- Est. Annual US Container Glass 'recycled'*
- Estimate of US annual glass to landfill*

* 10 Million tons of Container Glass is Extrapolation from US Census Bureau, 2005 Glass container, using .5 lbs/container.

* Split between recycled and Landfilled are OC estimates.



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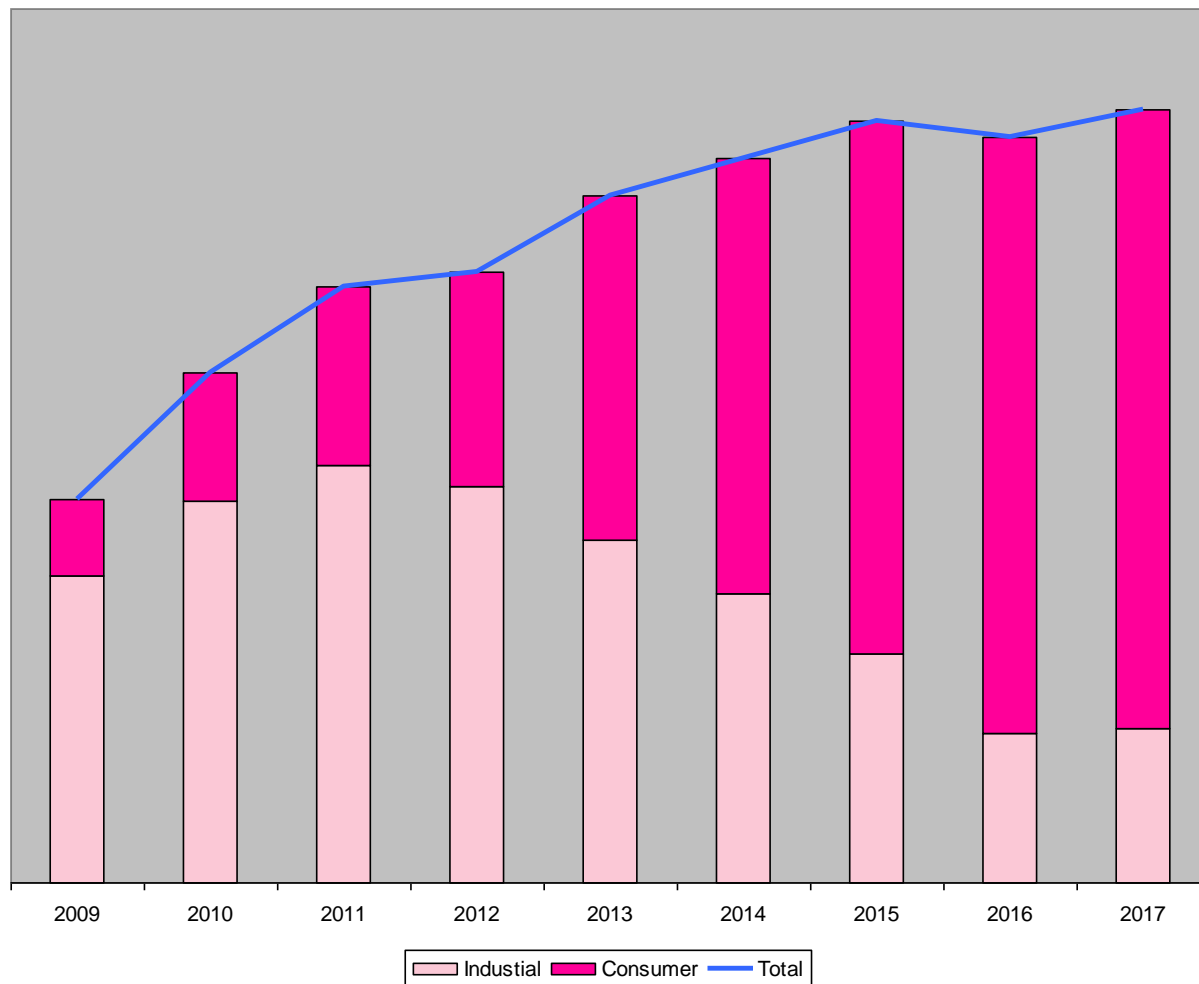


Cullet – Conversion to Post Consumer

As plate glass continues to decrease in the market, we will need to move to post consumer (bottle) cullet.

Post Consumer as % of Total Cullet

Year	%PC
2009	20%
2010	35%
2015	50%
2017	80%





Cullet Processing

- **Recent processing technologies allow cullet processors to handle “Dirty MRF” material**
 - Ability to Meet “Furnace Ready” Specifications
 - LOI
 - Ceramics
 - Metals (ferrous and non ferrous)
 - Color sortation
 - Grinding (consistent particle size)
 - 3-Mix Color
 - Color segregation is not required for Owens Corning





Future Direction

- **Continue to Increase Recycled Content**
- **Push Technical Limitations of Assets**
- **Convert to Post Consumer Content**
- **Develop Local Supplies**





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Questions

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Reinsulate Your Home This Weekend!